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ABSTRACT

Intended to provide the guidance needed for consistent and viable annual conference planning, this manual explains how to organize and plan for a successful and profitable conference, how to determine the responsibilities and duties of conference planners and coordinators, and how to plan for specific conference events. The responsibilities of a conference Board of Directors, and general policies on such issues as budgeting, programming, and registration, are discussed. The roles of the various committees, chairpersons, and coordinators involved in mounting a conference are outlined, including those concerned with programming, registration, exhibits, advertising, hospitality, and facilities and equipment. A conference planning flowchart, a detailed annual conference planning calendar, and a bibliography on conference planning accompany the text. Among the ten appendices to the manual are a sample conference evaluation instrument, a sample exhibit contract, an equipment and space needs form, a conference site checklist, and a conference survey instrument. (JL)

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Blueprint for Success...
A Manual for Conventions, Conferences, Seminars and Workshops

Compiled and Edited by

John J. Jax

The Wisconsin Library Association
Madison, Wisconsin

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INTRODUCTION

This document incorporates the collective wisdom and experience of key members of the Wisconsin Library Association who have considerable experience in conducting conferences, workshops and seminars both in and outside of WLA.

Function

The chief purpose of this manual is to provide consistent and viable annual conference planning. It is also intended to assist organization units in planning their respective conferences as well.

Distribution/ Revision

Copies of this manual should be provided to each member of the Organization Board of Directors, Conference Coordinator and Conference Planning Sub-committee. Copies should be returned to the Organization Administrator as conference responsibility ends. It should be revised annually with final approval of policy changes made by the Organization Board of Directors. This manual has been designed to facilitate functional, page by page revision.

Bibliography

A brief bibliography on conference planning is also included. See page XXVII-A-1.

Purpose of Annual Conference

The expressed purpose of the annual conference shall be promotion of viable programming; exposition of new publications, productions, hardware; meetings of divisions, sections, roundtables and the Organization as a whole; provision of a means for mutual exchange of professional and related information among peers; stimulation of interest in continuing education.

Survey Instrument

Programming needs change as time passes. The membership should be polled every three to five years in order to gather objective conference information and effect viable inprovement in format and programming. See Appendix A for sample survey.

BOARD OF DIRECTORS RESPONSIBILITIES

Site Selection/ Dates/Fees

Decisions pertaining to annual conference site selection and dates rests with the Board of Directors and will normally be made three to five years in advance of the conference being held. Other decisions resting solely with the Board are:

1. Conference registration fee.
2. Exhibitors and advertisers fee.
3. Limits on presenter honorariums.

Geographic Considerations

A large resort or hotel allowing a one roof conference site is preferred. In order to afford equal access by people from various regions, it is best to rotate the site geographically in accordance with facilities available.

Conference Facility Selection

Before a facility is selected, a report resulting from an on-site visit by two or more Organization members shall be given to the Board of Directors. See Appendix B for checklist. Site considerations in approximate order of importance area:

1. Reputation of the city and/or firm in holding conferences for projected numbers of participants.
2. Number and size of meeting exhibit spaces available.
3. Provisions for housing.
4. Access by the handicapped.
5. Meal capability and quality.
6. Public transit access.
7. Parking.
8. Audio visual capability.
9. Security (for exhibits mainly).
10. Location geographically in context with dates last held in that particular region.

GENERAL POLICIES

Budgetary Considerations

The annual conference is expected to be completely self-sustaining. All expenses, including pre-conference planning, should be budgeted as reimbursable expenses via the conference registration fee, exhibit fee and advertising fee.

The Board of Directors establishes the fee for registration, exhibitors, advertising and honorarium limits.

Local committees for conference planning should be utilized as much as possible in order to keep travel expenses and registration fee low.

Except for the Organization Administrator, exhibitors, those who attend the business meeting only, and non-organization presentors, everyone in attendance will pay a registration fee.

All reimbursable expenses must be budgeted in advance by the Conference Planning Committee.

All grants, gifts, etc., should be included in the conference budget as revenue items.

Registration Fee

The ratio of expenses to projected registration income should be amortized at 75%. Example: If the Organization anticipates 1,000 registrants, establish the registration fee sufficient to amortize expenses on the income basis of 750 registrants. This ratio will produce a 25% reserve contingency in the event that inclement weather, an energy crisis, unexpected expenses, or other emergencies preclude anticipated attendance or revenues.

The annual conference registration fee should not be set to create a sizeable profit.

Consideration should be given to establishing a lower registration fee for spouses and non-organization guests of members.

Members should not have to pay a registration fee to attend the business meeting only.

GENERAL POLICIES (continued)

Exhibitor's Fee	This fee is established by the Board of Directors upon the Conference Coordinator's recommendation. The exhibitor's fee should be reviewed annually and kept in line with charges by organizations of a similar nature.
Exhibit Hours	Exhibits should be open each day that the conference is held.
Program Advertising Fee	This fee is established by the Board of Directors upon the Conference Coordinator's recommendation and should be reviewed annually.
Honoraria Limits	• The Board of Directors after reviewing the conference budget and proposed registration fee, establishes honoraria limits for presenters which cannot be exceeded. This ensures a reasonable registration fee as well as prevents a single unit within the Organization from offering an exorbitant honorarium which would result in each registrant assuming an unfair registration assessment. In cases where a higher than established honorarium is paid, registrants attending that session should be assessed an additional charge to offset the amount exceeding the honorarium limits. • For speakers at general sessions not associated with a luncheon or meal, the honorarium will be amortized within the conference registration fee. • Organization members should not be paid an honorarium.
Presenter's Expenses; Letters of Agreement	• All projected reimbursable expenses must be stated in writing as agreed upon between the presenter and a conference planning representative. Copies of all agreements must be filed with the Conference Coordinator. See Appendix C for sample presenter-agreement letter. • Organization members acting as presenters will not be reimbursed for expenses. Note: The cost of a meal may be waived for a member who is a speaker at that session.

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- If possible, each presenter should be reimbursed on the conference site in order to clarify any discrepancies that might arise.

Lodging Accommodations

All conference-paid-for lodging accommodations should be arranged by the Conference Coordinator. Costs incurred must be included in the budget as overhead. Single-rate rooms should be provided only for:

- Presenters as agreed upon prior to conference.
- Organizational conference personnel as agreed to by the Board, such as Organization Administrator; Exhibits Chairperson; Conference Coordinator.
- A double room or, if possible, a suite should be provided for the Organization President because of hospitality responsibilities.

NOTE: Frequently, the conference hotel will provide the organization with one free room for every 50-100 registrants booked. If this is true, the Conference Coordinator should assign free rooms to presenters or officer here-to-fore mentioned in order to reduce overall conference expenses.

Luncheon/Banquets

Costs of all meals should include gratuities and tax. In cases where the honorarium and/or expenses exceed the conference limit, a surcharge sufficient to make up the difference should be applied to the meal cost.

Each person in attendance who partakes of a meal must have a ticket. The hotel cannot be reimbursed for meals provided without a ticket. Complementary meals for speakers must be included as expenses in the conference budget and a ticket provided for same.

Exhibits Opening WINE & CHEESE

As a suggestion, in late afternoon of the first day, an exhibits grand opening could be planned with contracted exhibitors sponsoring a wine, non-alcoholic beverage, and cheese event. Costs are absorbed on a shared basis by exhibitor. If costs are not assumed by exhibitors, then this conference expense must be budgeted. Care should be taked to provide a non-alcoholic beverage for those who do not partake of alcohol.

GENERAL POLICIES (continued)

Cash Bars	All cash bars must be self-sustaining or underwritten by a sponsoring group.
Refunds	The Organization Treasurer will issue refunds according to a list of eligible names provided by the Conference Coordinator, after the conference. No refunds are given for registration or meals after the cancellation deadline. No cash refunds are given at the conference.
Programming	During the annual conference, no sessions should conflict with the Organization business meeting and general sessions. Organizational units and other groups are encouraged to sponsor joint programming. This not only fosters unit interchange but provides opportunity to share costs of expensive programs.
Unit Responsibilities	Divisions, sections, roundtables, etc., are responsible for providing their own programming. Each unit chairperson is a member of the overall conference planning committee. Except for parameters of cost, overall theme of conference and schedule time, each unit makes final decisions pertaining to content and level of their programming. In order to keep planning expenses at a minimum and the group small and workable, only one unit representative will have expenses paid when attending planning sessions. Units must keep Conference Coordinator fully informed as to programming.
Keynote Speaker; Banquet Sessions	These are to be regarded as general sessions intended for all registrants. Responsibility for planning general sessions rests with the Conference Planning Committee. The honorarium should be ratified by the Organization Board of Directors and the cost amortized within the conference registration fee. Meal costs associated with these sessions should be self-sustaining.
Award Sessions	Because of the session length involved, awards sessions should not be held in conjunction with a keynote or notable banquet speaker and vice versa. Organizational units should be encouraged to hold their own awards sessions at a different period. This should be permissable.

GENERAL POLICIES (continued)

"Cracker Barrel"	At least one session should be provided for Organization officers, Board members, and registrants to discuss Association concerns. The session should be called to order by the President and kept informal.
Presenter Equipment Needs	It is the responsibility of the Local Arrangements Chairperson to survey presenters at the time final agreements are made in order to discern their equipment needs. See Appendix D for sample form.
Pre/Post Conferences; Continuing Education (C.E.U.)	General Guidelines: • Decisions on dates, site, cost and schedule rest with the sponsoring group in close coordination with the Conference Coordinator. • Pre/post conferences must be self-sustaining and not overlap annual conference. • Publicity, local arrangements, registration, etc., responsibility resides with the sponsoring group.
Final Report	Copies of the final conference report are to be filed with the Organization Office, Newsletter Editor, President, Vice President, Administrator, and Assistant Conference Coordinator. The final written report is to be submitted to the President and Board of Directors no later than 90 days after the conference by the Conference Coordinator. The final report is to include: • Treasurer's detailed summary of expenses, revenues and profits/losses. • An evaluation summary as per conferees completed surveys. • An analysis of conference problems and highlights. • Recommendations for the future. (To be considered by the next planning committee.)

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A conference summary article should be submitted to the Organization Newsletter Editor by the Conference Coordinator.

Insurance

- The Organization should be protected from all conferee and guest liabilities during the time the conference is in session. If the host facility does not have such coverage, the Association should afford same. The President is responsible for checking this matter. An amount of $150-200 should be budgeted and amortized through the registration fee to cover the premium.

UNIT CONFERENCES

This manual should be used by units planning conferences, workshops, etc., regardless of size.

General Considerations

- Divisions, sections, roundtables, or other Organization affiliated groups should avoid holding conferences later than one month before the annual conference.
- Careful planning of dates should include considerations of already scheduled conferences, workshops, etc., of Organizational Units. Check with the Organization Administrator before selecting dates.
- Consideration should be given to scheduling programming which will be of interest to multiple units within the Organization.
- Unit conferences must be self-sustaining.
- If possible, an organization membership form should be included with mailings or in the design of the conference brochure. Contact the Organization Administrator for appropriate information.

Official Treasurer

The Organization Treasurer normally acts as Conference Treasurer for any unit, committee and/or organization conference.

CONFERENCE PLANNING FLOW CHART

Decision: 3 Years Before

Board of Directors select site, dates; exhibit & meeting rooms reserved; lodging reserved.	Information released to Organization Newsletter. Fixed in Organization Office.

Decision: 1 Year Before

Vice President elected Selects Assistant Conference Coordinator, 2 years ahead.	Conference Coordinator appoints sub-committee chairpersons. Sub-committee chairpersons appoint their committee people.

Decision: 10-12 Months Before

Initial planning meeting called by Coordinator. Theme selected.	Conference planning schedule/matrix initiated.

Decision: 3-6 Months Before

Board of Directors approves planning budget; sets exhibitors's fees and honoraria limits.	Presenters contacted.

Procedure: 3-6 Months Before

Speakers/presenter agreements formalized; meal ticket designed.	Local tours organized.

Decision: 60-90 Days Before

President issues call-to-conference; agenda for business meeting established. Registration information sent to membership.	Information to appear in Newsletter.

Decision: 30 Days Before

Ads sent to printer. Speaker/presenter equipment arranged; court reporter contracted for business meeting.	Copies of exhibitor's contract returned.

Procedure: 10 Days Before

Pre-registration deadline. Meal counts verified. Spaces assigned sessions. Registration packets assembled.	On-site arrangements finalized.

Procedure: 30 Days After

Approved refunds made by Treasurer. Thank you letters written to advertisers, exhibitors, presenters.	Final conference reports assembled from sub-committees.

Procedure: 60 Days After

Treasurer pays final conference bills and gives written financial report to Coordinator.

Policy: Within 90 Days After

Conference Coordinator gives final written report to Board of Directors.	Report appears in Newsletter.

PRESIDENT'S RESPONSIBILITY - ANNUAL CONFERENCE

Contractual Agreements	All official arrangements will be confirmed in writing by the President with copies given to the President, Vice President and Organization Administrator.
Official Files	The official files for conference arrangements will reside in the Organization Administrative Office.
Overall Planning Coordination	The President is ultimately responsible for the planning and completion of the annual conference. The President's role actually begins when he/she as Vice President/ President-Elect selects an Assistant Conference Coordinator to work with the incumbent Conference Coordinator and Associate Coordinator. This appointment continues into the following year when that person becomes general Conference Coordinator as a matter of procedure.
Specific Duties	Other duties include: 1. Secures Board of Directors approval for an adequate conference planning budget. 2. Presides at all general sessions of the annual conference or designates an appropriate substitute. 3. Issues the official call-to-conference and establishes the business meeting agenda which will be mailed to membership at least 60 days before date of annual conference. 4. In cooperation with an Awards and Honors Committee Chairperson, plans appropriate awards ceremonies. 5. Checks to see that appropriate insurance liability coverage for conferees and guests is in effect.

PLANNING COMMITTEE

The planning committee may wish to include persons such as: President, Vice President, Conference Coordinator, Assistant Coordinator, Public Relations Chairperson, a representative from the exhibitors group, charipersons of conference sub-committees previously mentioned, chairpersons of divisions, sections, roundtables, and other groups who need to become involved.

This committee will adopt a conference theme which should serve as a central focus for program emphasis.

CONFERENCE COORDINATOR

The Conference Coordinator should be someone who resides in proximity to that year's conference site. This person will have had one year of planning experience as an Assistant Coordinator of the previous year's annual conference. This person should have good management perspective, planning expertise, delegative abilities and possess a thorough understanding of the Organization. This person will work closely with the President in selecting sub-committee chairpersons for: program planning, local arrangements, registration, exhibits, program advertising, local publicity and other responsibilities as deemed necessary.

Responsibilities of Conference Coordinator

Responsibilities of the Conference Coordinator basically include overall conference coordination. See Page XXV-A-1-2-3 for Planning Calendar for chronology of events and page V-A-1 for Conference Planning Flow Chart.

Specific Duties

1. Reviews official letter(s) of agreement between the the Organization and the conference facility. Official agreements should be on file in the Organization Office. Obtains specific facility logistics such as: number and cost of registrants' rooms provided at conference rate; number of free rooms per people booked; floor plans giving size and location of meeting rooms; exhibit space, including utilities available, cost and security agreement; a list and cost of meals; cost of coffee per gallon and beverage for exhibits, special sessions, etc.

2. Calls the initial planning meeting eleven (11) months before the conference, preferably at the conference site. Those attending should include: President, Vice President, Organization Administrator, Public Relations Chairperson, Local Arrangements Chairperson, Program Chairperson, Exhibits Chairperson, Advertising section, roundtable chairpersons, and a representative of the conference facility.

3. Designates Organization Public Relations Chairperson as Conference Publicity Chairperson in order to assure close coordination in providing state-wide publicity.

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4. Arranges for a conference evaluation form to be given to each registrant. Gathers and tabulates same. See Appendix E for sample.

5. Is responsible for publicizing conference in advance, during conference, and post conference summaries in close liaison with Public Relations Chairperson. See Appendix F for sample press release.

6. Gathers and compiles all conference sub-committee final reports including session attendance, expenses/ receipts and problems.

7. Makes a final written report to the Board of Directors within 90 days after conference. The report is to include a summary of evaluations and recommendations for future conferences. See Conference Planning Calendar on page XXV-A-1-2-3 for time periods.

ASSISTANT CONFERENCE COORDINATOR

Appointed by the President-Elect to work closely with the Conference Coordinator prior to assuming the Coordinator responsibilities the following year.

Specific Duties

1. Assists Conference Coordinator in design of conference schedule matrix and implementation of the conference evaluation instrument.
2. Checks to see that conference budget is adhered to by divisions, sections, roundtables, etc.
3. In cooperation with the Conference Coordinator, selects an Assistant Chairperson of Exhibits and Advertising. These persons will serve as chairpersons respectively the following year.
4. Acts as a liaison person during the conference resolving difficulties as they arise.
5. Is responsible for incorporating summary conference planning recommendations in the planning of the next annual conference.

ASSOCIATE COORDINATOR (ORGANIZATION ADMINISTRATOR)

The Organization Administrator works directly with the Conference Coordinator as Associate Coordinator in matters of providing operational continuity. Since the official conference files reside in the Organization Office, it is necessary that the Conference Coordinator meet early with the Associate Coordinator and obtain necessary contractual agreements, correspondence and past budgetary information. This person is not normally involved in program aspects of the conference, but should be included in all planning sessions. This person is responsible for depositing all fees collected from registration, advertising and exhibits.

Specific Duties

1. Arranges for mailing of registration information to membership at least six (6) weeks prior to the conference with the instructions that payment is to be returned no later than ten (10) days before the conference. NOTE: If money does not accompany registration, the registrant should be contacted immediately. If conference registration money is not received ten (10) days before conference, the reservation will not be held for registrant.

2. Receives registration forms and deposits registration money in Organization account; keeps deposit name list and turns a copy of same over to Conference Registration Chairperson.

3. Sends out registration receipts to those registrants who request same.

4. Provides for an organization membership, publications sales table at conference site and arranges with the Membership Chairperson for staffing. Works closely with Membership Chairperson in providing a membership list, registration forms, sales publications, etc.

5. Arranges for a court reporter, if necessary, to record verbatim minutes of business meeting; files two copies of minutes. Transmits expense voucher to Conference Coordinator for signature.

6. Provides for security of monies received at registration, publication sales and membership tables (usually hotel safe). Deposits on-site conference receipts in Organization bank account.

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ASSOCIATE COORDINATOR (ORGANIZATION ADMINISTRATOR) (continued)

7. Works closely with President to assure that the call-to-conference and business meeting agenda is sent to membership at least sixty (60) days prior to conference.

8. Obtains conference reports from the Organization Treasurer and Conference Coordinator for purposes of placing a conference summary in the Organization Newsletter.

PROGRAM CHAIRPERSON

This person is appointed by the Conference Coordinator and works directly with chairpersons of divisions, sections, roundtables, standing committees and the President in planning for appropriate programming. Divisions, sections, roundtables, etc., are directly responsible for planning their own programs and making respective speaker/presenter arrangements. Copies of agreements should be given to Conference Coordinator.

Specific Duties

1. Engaging speakers/presenters, at the discretion of the program planning committee, for general sessions and banquet and informs Conference Coordinator of same in writing.

2. Assisting Conference Coordinator in scheduling rooms; assisting Local Arrangement Chairperson in arranging meals.

3. Checking to see that presenter's expense forms have been distributed, completed and returned.

4. Arranging for presenter's reimbursement by the Organization Treasurer at the conference.

LOCAL ARRANGEMENTS CHAIRPERSON

The Local Arrangements Chairperson should live in the conference city area, have considerable administrative ability and freedom to work on arrangements during regular working hours. This person establishes local arrangements sub-committees as necessary, in consultation with the Conference Coordinator.

Specific Duties

1. Appoint chairpersons and member for the sub-committees. Chief sub-committees are:

   Registration
   Meal and beverage functions
   Hospitality and local public relations
   Meeting rooms, signs and equipment
   Tours and entertainment
   Transportation

2. Furnish conference program and publicity chairpersons with a list of planning committee appointments.

3. Clearly define assignments and establish deadlines for each committee.

4. Become familiar with motel/hotels and convention center.

5. Confer with convention center management and convention bureau and/or Chamber of Commerce to determine the services offered for conferences held in the city or area such as local printed materials, typist, cashiers, ticket sellers, assistance with motel/hotel reservations and transportation.

6. Invite Conference Program, Public Relations and Exhibits Chairperson to meetings of the Local Arrangements Committee.

7. Schedule meetings at the conference site when possible in order to orient committee personnel to working in the facilities and spaces.

REGISTRATION CHAIRPERSON

Appointed by the Conference Coordinator, this person selects a working team to staff the registration desk during each day of the conference. Because of the heavy pre-conference responsibilities it is best to select a Registration Chairperson who has ample working space to process pre-registration badges for each registrant and meal tickets, etc.

Pre-Conference and Conference Duties

1. Prepares advance registration and meal reservation forms and submits same to Conference Coordinator for review at least 90 days before the conference. The form should include: notice of refund policy; a statement instructing people to use one form for each person registering and how hotel reservations should be made; hours of on-site registration; policy for non-member registration.

2. In cooperation with the Conference Coordinator, arranges for the printing of: portfolio type envelopes for conference registrant kits; consecutively numbered tickets for all meals, tours, banquet. Tickets should be of different colored stock for each session or event.

3. Provides at the conference registration desk envelopes or packets with each registrant's name, fee paid, tickets, and badge.

4. Special identification badges should be provided for Officers, Organization Administrator, exhibitors and presenters/guests. A color code key should always be provided to the Advertising Chairperson for printing in the program booklet. Those attending for only one day should be given a stick-on badge.

5. Plans with the Local Arrangements Equipment Committee for an adequate number of tables, chairs, typewriters, cash boxes, pens and pencils and signs steering people to appropriate pre- and current registration stations, membership table. For expediency it is best to break the alphabet for pre-registration lines.

6. A telephone should be provided at the registration desk if cost is reasonable.

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7. To save costs, it is sometimes possible to arrange for vendors to supply conference portfolios free of charge.

8. Works directly with the Conference Coordinator and Organization Administrator to keep a record of the exact number of registrants for one day, entire conference, each meal/luncheon, etc. Authorizes and gives a list of refund amounts with names to Conference Coordinator for reimbursement. No cash refunds are given at the conference.

9. Received registration forms from Organization Administrator and follows up on any amounts due or questions pertaining to registration.

TREASURER: CONFERENCE RESPONSIBLITY

Establishes a conference expenditures account (includes conference planning amount for seed money) in cooperation with the President. The amount must be approved by the Board of Directors during the regular budget process. In tabulating conference proceeds (profits), the planning amount should be deducted from proceeds.

Specific Duties

1. Supplies $100 in change for the registration desk and $50 to the Organization Membership Chairperson at the beginning of the conference. Pays bills at conference if possible.

2. Receives and pays conference bills as approved and vouchered by the Conference Coordinator, charging same against conference ledger account.

3. Receives deposit notices of conference income from Organization Administrator and posts income in conference ledger account.

4. Confers with the Conference Chairperson to ascertain that all expenditure have been paid and that all income is accounted for as soon after the conference as is possible.

5. After the conference, issues refund checks from a list approved by the Registration Chairperson and Conference Coordinator.

6. Provides a written financial report of conference deposits and expenditures to the Conference Coordinator within 60 days following the conference.

EXHIBITS CHAIRPERSON

This person, who served as the Assistant Chairperson the previous year, works closely with the exhibitor's representative(s) and conference facility representative in establishing exhibits location, number of booths and layout.

An assistant chairperson will be appointed by the Vice Presiden/President-Elect who will become the chairperson the following year. An exhibits sub-committee should also be appointed.

Specific Duties

1. Establishes location of exhibit area.

2. Designs an exhibits layout sheet to determine the number of exhibit booths possible.

3. Sends an announcement letter to all potential commercial and non-commercial exhibitors which includes: booth fee, exhibit layout sheet, size, contract, exhibit hours, five months before the conference. Establishes a deadline date for returned contracts of four weeks before conference. See Appendix G, H.

4. Collects a deposit fee and/or complete rental fee and turns same over to Treasurer. Balance of fee is due on the first conference day. Forfeiture will occur if the exhibitor does not use reserved space and the Association cannot rent same to another exhibitor. Refunds will be issued to exhibitors who cancel two weeks prior to the conference.

5. Assigns booths to exhibitors in order of contract reservation receipt. Important: Exhibitors vending similar wares should not be placed side by side, e.g., two library furniture dealers. Returns copy of contract and receipt to exhibitor giving booth number.

6. Arranges with a commercial exhibit set-up vendor to provide for actual booths if conference facility does not provide such.

7. Gives a list of exhibitors to Program Advertising Manager for inclusion in the conference program book. See conference planning schedule for deadline.

continued...

EXHIBITS CHAIRPERSON (continued)

8. Makes arrangements with Local Arrangements Chairperson to insure that each exhibitor receives a name badge, exhibitor's ribbon and registration packet.

9. Solves problems and makes adjustments pertaining to exhibitor needs.

On-site Exhibit Arrangements

During exhibit set-up time and throughout the conference the Exhibits Chairperson and Assistant Chairperson will arrange to be present to resolve problems.

Specific Concerns

1. Gives a copy of the exhibits floor plan, listing exhibitor and number, to the Conference Facility Manager.

2. Makes arrangements with the conference facility for tables, chairs, electrical cords, table coverings, etc., with Conference Facility Manager. This should be done the day before conference begins.

3. Places name and booth number of each vendor in booth prior to vendor arrival.

4. Greets vendors as they arrive for set-up.

5. Supervises the dismantling of exhibits; helps to arrange for any materials which need to be shipped; provides for vacation of area within time frame previously agreed upon; informs vendors not to dismantle exhibits before official closing time.

6. Returns forgotten exhibit items to vendors.

7. Provides for security for exhibits area when closed. May hire security guards when not supplied by conference facility as per conference budget.

Post-Conference Activities

1. Immediately forwards to Organization Administrator all remaining fees collected and an itemized statement.

2. Within one month after the conference, submits a written itemized report to the Conference Coordinator.

continued...

EXHIBITS CHAIRPERSON (continued)

3. Within one month, sends a thank you letter to exhibitors, conference facility and commercial booth set-up vendor if one is used.

ASSISTANT EXHIBITS CHAIRPERSON

Selected by the Assistant Conference Coordinator, this person will become the Exhibits Chairperson the following year. This person should live in the area where the conference will be held the next year.

Specific Duties

1. Assists Exhibits Chairperson in coordinating exhibit assignments.
2. Is available on-site to assist exhibitors with set-up and dismantling.
3. Becomes acquainted with logistical problems involving the conference facility.

PROGRAM ADVERTISING CHAIRPERSON

Appointed by the Conference Coordinator. This person, who served as the Assistant Chairperson the previous year, is responsible for producing the conference program booklet. A sub-committee may be established as is necessary.

Specific Duties

1. Solicits advertising for the conference program booklet:
   - Utilizes exhibits mailing list.
   - Works with Local Arrangements Chairperson obtaining list of potential advertisers in conference area.
   - Sends letters to above groups stating ad costs and sizes available. See sample letter in Appendix I, J.
2. Writes follow-up letters or calls potential advertisers who have not responded to original request to advertise.
3. Select a program printer based upon quality reputation, charges, reliability and availability.
4. Provides each exhibitor with one copy of program booklet.
5. Discuss advertising with exhibitors during conference to discern satisfaction level.
6. Deposit advertising money with Organization Treasurer.
7. Present all bills to Conference Coordinator for approval and submission to Organization Treasurer for payment.
8. Within one month after conference, write thank you letter to advertisers and encloses a program book to all non-exhibitors.

Program Booklet

Size, at least 5" x 7" recommended.

continued...

PROGRAM ADVERTISING CHAIRPERSON

- Cover design and color - to be decided by Conference Planning Committee.
- President's message on first page.
- Names and pictures of Organization Officers and Administrator follow along with Conference Planning Committee.
- Conference program, 8-12 pages in center of booklet.
- Ads; include booth number.
- Index to advertisers.
- Obtain photos and biographical sketches of featured speakers.

Conference Program Booklet Schedule

- Six months prior to conference, send letter soliciting advertisements (ads). Enclose contract in duplicate. See Appendix H for sample. Indicate deadline for receipt of ad copy. (Six weeks prior to conference.)
- As ads are received, send letter of acknowledgement. Give all ads to printer. Send all fees received to Administrative Secretary.
- Exhibits Chairperson will forward names of exhibitors as received. If ad copy is not received in a reasonable time, send a reminder.
- Six weeks before conference, send final reminder to exhibitors if their ad copy has not been received. Printer should have most of the ads ready for printing. Exhibits Chairperson will be assigning booth number. Obtain booth number list so same can appear on ads.
- Four weeks before conference, get the program from the Conference Coordinator, total number of pre-registrations to-date to determine quantity, obtain the President's message, list of officers, etc.
- Three weeks before conference: The final deadline for receiving ad copy. Final printing and assembling takes about one week. Have at least 250 extra books printed.

continued...

PROGRAM ADVERTISING CHAIRPERSON (continued)

- Ten days before conference (or whenever local arrangements committee needs them) deliver the programs to the Registration Committee for inclusion in the packet.

Advertising Prices (1981)

	Commercial	Non-Commercial
¼ page	$35	$17.50
½ page	$55	$27.50
Full page	$75	$37.50

Special Prices:

Inside front cover:	$140
Inside back cover:	$115
Outside back cover:	$165

ASSISTANT ADVERTISING CHAIRPERSON

Selected by the Assistant Conference Coordinator, this person will become the Advertising Chairperson the following year.

Specific Duties

1. Assists the Advertising Chairperson in coordinating advertising for the conference program book.
2. Calls, writes potential advertisers who have not responded to original request to advertise.
3. Assists in the design and layout of the conference program book.

EXHIBITOR'S REPRESENTATIVE

Selected by the Conference Coordinator and invited to all conference planning sessions, ideally the representative is a continuing exhibitor who is familiar with the exhibit environs germane to the Organization's annual conference. In order to be fair to the most loyal exhibitors, no person or firm representative should serve more than two consecutive years.

Specific Duties

1. Provide counsel to the Conference Planning Committee in accordance with exhibitor's specific needs.
2. Assists the Exhibits Chairperson in designing an exhibitor's evaluation instrument.
3. Makes written recommendations to the Conference Coordinator with respect to future considerations within 30 days after the conference.

SUB-COMMITTEE APPOINTMENTS

Rationale

Conference results are best effected by having highly participatory and gradually changing committee memberships. The general Conference Coordinator should be rotated and not sustained more than one year consecutively. Sub-committee chairpersons should be rotated similarly.

Other sub-committee chairpersons responsible for program, local arrangements, registration, local publicity, etc., will be changed annually as it is best to have people in close proximity to the conference site serve. The exhibitor's representative will be rotated every two years, also.

REGISTRATION COMMITTEE

Specific Duties

1. Pre-registration. Receives registration forms from Organization Administrator.
2. On-site registration. Provides necessary registration desks of generous size (sometimes furnished by convention center or decorator contractor).
3. Furnish information signs for registration station.
4. Design and set up registration area prior to opening of conference.
5. Secures a bonded cashier to handle registration fees and meal tickets. Obtain $50 cash from Organization Treasurer. Stuffs conference packets and decides what is included.
6. Inform the cashier selling numbered meal tickets as to capacity and cut-off deadline for sale of tickets in writing.
7. Post appropriate signs to expedite access to services.
8. Furnish the Conference Coordinator with a list of names and addresses of persons requesting refunds within two weeks of the end of the conference.

Registration Policies/ Procedures

1. Inform a registrant who claims he or she pre-registered and there is no envelope in his/her name, that he/she must re-register and pay the fee. After conference, duplicate payment, if received, will be refunded. No refunds are made at conference site.
2. Registrants who cannot produce an organization membership card or membership cannot be established from membership list, may register at member rates. Mark registration form for later checking and billing by Organization Administrator. Proper fee will be assessed.
3. Register all persons attending any conference function, including those attending the business meeting only.

continued...

REGISTRATION COMMITTEE (continued)

4. Receive a list of guest registrations and meal tickets from Conference Program Chairperson as approved by Conference Coordinator. (Be sure to include in ticket count.)

5. Except for exhibitors, non-organization presenters and members attending the business meeting only, everyone in attendance will pay a registration fee.

6. If registration money is not received ten (10) days before conference, the reservation will not be held for registrant. See Associate Coordinator duties.

MEAL AND BEVERAGE FUNCTION COMMITTEE

This committee is responsible for arranging all meal and beverage events. The amount must be determined in advance. Do not guarantee meals that have not been paid for. Meal tickets should be used. Arrange with hotel to collect them.

Specific Duties

1. Arrange for all conference meal and beverage functions in conjunction with Program Chairperson.
2. With advice of Conference Coordinator, choose menus and set prices sufficient to cover cost of meal, gratuities and tax.
3. Provide meal ticket information to Conference Coordinator with number of tickets to be printed. Tickets should be printed with all function information, be consecutively numbered and of different colors for different events.
4. Determine number of persons attending each meal and beverage function in cooperation with Registration Committee.
5. Arrange for extra chairs to be set for persons who choose to come just to hear the speaker only.
6. Prepare head table place cards for banquet and other functions. Obtain seating charts from Conference Coordinator.
7. Collect meal tickets from head waiter and certify payment for number of tickets collected.
8. Have extra banquet tickets for last minute emergencies and establish policy on use.

HOSPITALITY AND LOCAL INFORMATION COMMITTEE

This committee is responsible for making all persons attending the conference feel welcome.

Specific Duties

1. Work with other committees on all conference functions.
2. See that hosts or hostesses are assigned to all guests and speakers.

Hospitality Desk

Request and staff a hospitality desk adjacent to registration area. Suggested materials for Hospitality Desk:

- Map of city and/or area.
- Map of hotel area.
- General information about city or area including transportation, tours, historical places, recreation, stores, theatre, museums and directions for reaching them.
- List of restaurants, descriptions, price ranges and locations.
- List of libraries open to visitors.
- List of churches, time of services.
- Copy of official program and all committee meeting dates and places.
- Daily newspaper.
- City and area directory.
- Street guide if located in a city.
- Names of doctor, dentist, oculist, emergency numbers.
- Aspirin, first aid kit, pins, needle and thread, pencils, pads, etc.
- Hospital location, druggist locations and phone numbers.

HOSPITALITY AND LOCAL INFORMATION COMMITTEE (continued)

Local Information

1. Provide local information for Publicity Chairperson, hospitality desk and conference participants.

2. Collect materials and prepare conference kits in cooperation with Registration Chairperson and deliver them to the conference registration area.

   - Identify firms which may be asked to provide or pay for kit envelope. (Suppliers' budgets are usually planned in the fall for the following year.)

   - Confer with Conference Coordinator and Registration Chairperson on number of kits to be prepared.

MEETING ROOMS, SIGNS AND EQUIPMENT

This committee is responsible for the smooth running of the technical side of the conference. The chairperson should be available as a trouble shooter, assigning others to monitor and check on meeting rooms during the conference.

Specific Duties

1. Become familiar with space, location and dimensions of rooms, elevators, stairs, escalators, lighting, audio visual facilities, etc. Provide maps of conference facility for registrants.

2. Obtain from the Local Arrangements Chairperson a schedule of facilities and equipment needed for each meeting and room set-up required.

3. Assign rooms and develop a facility schedule for use of conference committees and convention center staff.

4. Arrange for special equipment and/or rental agreements. Know operation of the equipment. Submit estimates of all costs to conference coordinator for approval before ordering.

5. Provide for a locked room to secure equipment.

6. Prepare signs as needed. Signs should be posted at every meeting room with schedule for that room for the entire day. Obtain sign requests from Conference Coordinator.

7. Appoint a large working committee so that persons are available to check each room at least one hour preceding every meeting. Check ventilation, air conditioning, microphones, table set-up, water and glasses and ashtrays in smoking area of room. The Chairperson of this committee should check with hotel each A.M. for daily set-up, changes, etc.

8. Furnish Local Arrangements Chairperson with listing of room assignments for the program.

Smoking vs. Non-Smoking Areas

Designate very small (50 or less) rooms as being "no smoking". For larger meeting areas, designate a no smoking area or section with signs.

ANNUAL CONFERENCE PLANNING CALENDAR

3 Years Before Conference	Organization Board of Directors selects site and dates; President reserves a block of hotel rooms; obtains letter of agreements and files same with Organization Office.
2 Years Before Conference	Assistant Conference Coordinator selected by Vice President.
10-12 Months Before	Organization Vice President appoints Assistant Conference Coordinator. Conference Coordinator appoints sub-committee chairpersons. Conference planning budget submitted to President by Conference Coordinator for approval by Board of Directors. Exhibitor's fee established by Board of Directors. Conference Coordinator calls initial planning meeting at conference site. Conference schedule matrix initiated. Exhibit area and meeting rooms reserved. Letter of agreement with conference facility revised.
9-10 Months Before	Second planning meeting called to discuss program ideas, theme, etc. Initial contacts with speakers made.
6-9 Months Before	Additional meetings of Conference Coordinator with sub-committee chairpersons. Letters of agreement between division, section, roundtable and other chairpersons with speakers obtained and copies filed with Coordinator. Agreements should list all fiscal agreements. Conference registration form is developed. Publicity, local and state-wide, is formulated. Exhibitor's letters of invitation sent out. Exhibits layout designed according to space available. Letter soliciting advertising in conference programs mailed. Local arrangements committees appointed and begin planning.

ANNUAL CONFERENCE PLANNING CALENDAR (continued)

3-6 Months Before	Final speaker/presenter agreements formalized. Local Arrangements and Registration Chairpersons design meal tickets, registration packets, arranges for local tours, Chamber of Commerce publications, etc.
60-90 Days Before	Call-to-conference and Organization business meeting agenda submitted to Organization Administrator. Registration forms given to Administrative Secretary for mailing. Conference evaluation instrument developed.
45-60 Days Before	Send final reminder to exhibitors if their advertising copy has not be received. All programming finalized. Exhibitors assigned booths as requests and deposits are received. Meals/luncheons selected.
30-Days Before	Conference Coordinator gives program schedule to Advertising Chairperson for final edit. President's message given to Advertising Chairperson. Final deadline for receiving ad copy. Ads sent to printer. Speaker/presenter equipment needs arranged. Court reporter contracted for business meeting if necessary. Final exhibit space assigned and copy of contract returned to exhibitor.
10 Days Before	Final pre-registration deadline. Ads Chairperson delivers conference programs to Registration Chairperson. Registration packets assembled and readied. Local Arrangements Chairperson verifies meal/luncheon counts, space needed for each session, equipment, etc., and gives same to Conference Facility Manager. Appropriate conference signs are printed. Organization membership list obtained by Administrator for registration desk.

ANNUAL CONFERENCE PLANNING CALENDAR (continued)

Within 30 Days After	Approved refunds have been made by Treasurer. Thank you letters to presenters, advertisers and exhibitors have been sent. Conference Coordinator receives and verifies hotel invoices for accuracy. Requests that all bills be submitted, approves and vouchers to Treasurer. Final conference reports assembled. Exhibitor Representative's report submitted to Conference Coordinator.
Within 60 Days After or Before End of Fiscal Year, Whichever Comes First	Treasurer pays final conference bills and gives written report to Conference Coordinator.
Within 90 Days After	Conference Coordinator gives final written report to the Board of Directors, Organization Newsletter Editor and Treasurer.

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*Excellent

APPENDIX A

CONFERENCE SURVEY INSTRUMENT

Return by (date) to: (Name and address)

I. Divisional Membership: Check one

___(Name) ___(Name) ___(Name) ___(Name) ___Other

II. Unit Affiliation: List_____

III. Where should future conferences be located? (circle one)

	least desirable				most desirable
Large city downtown	1	2	3	4	5
Large resort (one roof)	1	2	3	4	5
Southeastern Area	1	2	3	4	5
Western Area	1	2	3	4	5
Central Area	1	2	3	4	5
Northeast Area	1	2	3	4	5
Northwest Area	1	2	3	4	5

Other:

IV. What time of year is best?

	least desirable				most desirable
Spring	1	2	3	4	5
Summer	1	2	3	4	5
Fall	1	2	3	4	5
Winter	1	2	3	4	5

Month; list_____

V. What days do you prefer?

	least				best
Thurs. thru Sat.	1	2	3	4	5
Wed. thru Fri.	1	2	3	4	5
Fri., Sat. & Sun.	1	2	3	4	5

Other:

VI. What type of conference session do you prefer?

	least useful				most useful
Small group working session	1	2	3	4	5
Panel discussions	1	2	3	4	5
Large lecture-type	1	2	3	4	5

Other:

Comment:

VII. Do you prefer a banquet speaker?

_____ Yes _____ No

VIII. Do you prefer a banquet speaker in conjunction with another session?

_____ Yes _____ No

Comment:

IX. Are you willing to pay a higher registration fee to support a big-name banquet speaker?

_____ Yes _____ No

Comment:

X. What type of luncheon/dinner menu do you prefer?

	least preferable				most preferable
Soup & sandwich	1	2	3	4	5
Salad only	1	2	3	4	5
Full entrees	1	2	3	4	5

Other:

XI. How long should exhibits be open?

	least useful				most useful
Thurs. & Fri.	1	2	3	4	5
Thurs. only	1	2	3	4	5
Fri. only	1	2	3	4	5
Each day of conf.	1	2	3	4	5

Other:

XII. Should a profit be made on conferences to help defray operational expenses of the Organization?

_____ Yes _____ No

Comment:

XIII. Has the Conference served your needs in the past? If not, please list suggestions for improvement below:

XIV. Should units (divisions, sections, etc.) have complete autonomy in scheduling their own conferences, workshops, etc., providing such are held no later than one month before the Organization annual conference?

_____ Yes _____ No

Comment:

XV. Should the Organization attempt to hold a joint annual conference with related professional groups?

_____ Yes _____ No

Comment:

* NOTE

Return by (date)

THANK YOU

APPENDIX B

CONFERENCE SITE CHECKLIST

	YES	NO
I. Physical Considerations		
A. Access		
1. Is there state-wide air, bus or rail access?		
2. Is there adequate fuel available on-site or nearby (3-5 miles)?		
3. Is parking sufficient to accommodate (number) vehicles?		
4. Have special considerations been given to providing handicapped access to facilities?		
a. ramps		
b. elevators		
c. specially equipped restrooms		
5. On-site or in-city lodging (rooms) for (number) registrants?		
6. Sufficient restaurant facilities to accommodate same number of people?		
B. Conference Meeting Facilities		
1. 10-15 small group meeting rooms to accommodate 50.		
2. 2-3 rooms to accommodate 200-250.		
3. One large banquet room to accommodate (number).		
4. A secured exhibit area, with electric utility sufficient to accommodate (number) booths.		
5. A convenient area to provide daily registration for several hundred conferees.		

continued

CONFERENCE SITE CHECKLIST

	YES	NO
I. Physical Considerations		
B. Conference Meeting Facilities (continued)		
6. Audio visual capability		
a. ceiling-mounted matte-white screens		
b. portable screens		
c. light dimming control		
d. 16mm projector(s) available		
e. 35mm projector(s) available		
f. overhead transparency projector(s) available		
g. microphones in each room		
h. portable microphones available		
i. is there an electronics technician on duty during conference		
II. Conference Facility Policies		
A. Method of Charges		
1. Are all meeting rooms free, including exhibit area?		
2. Does facility provide free security for exhibits during non-open hours?		
3. Are a certain number of free rooms provided the Organization?		
4. Will the facility set aside a block of rooms at a special conference rate?		
5. Do meal/luncheons include tax and gratuity?		
B. Other Conferences		
1. Is there another conference bocked for the same dates? If not, will there be?		
2. Is there a facility conference contract?		

continued

CONFERENCE SITE CHECKLIST

	YES	NO
III. Miscellaneous		
A. Medical Assistance		
1. Does the facility have a medical doctor on call?		
2. Are there on-site first-aid supplies and other emergency equipment available?		
3. Is there ambulance service available?		
B. Recreational Programs		
1. Does the facility have recreational programs available?		
2. Is there recreational personnel on-site?		

APPENDIX C

SAMPLE PRESENTER-AGREEMENT LETTER

Dear _____:

We are pleased that you will act as presenter during the (Organization name) conference, on (date). We are asking that this letter serve as a formal agreement with respect to reimbursable expenses. It is our understanding that the following estimated expenses will be reimbursed:

_____ honorarium
_____ lodging (single room rate)
_____ meals
_____ transportation
_____ other, please list

As per (Organizational name) policy, no reimbursement will be provided for: personal long distance calls from your motel/hotel; valet service; alcoholic beverages or for expenses of persons accompanying you.

Please let me know if any further arrangements need to be made. Thank you.

Sincerely,

Conference Representative

cc: Conference Coordinator

APPENDIX D

*Please complete one form per event.

Application for Meeting Space and Equipment
Conference, (Organization name), (date)
(Name of Conference facility)

Group requesting _____

Group representative _____

Address of representative _____

_____ Phone no. _____

Date needed _____ Time needed _____

Type of event: _____ Lecture Estimated attendance _____

_____ Panel

_____ Meal

_____ Other (Explain) _____

Set-up requirements: Tables for seating _____ people

Chairs for _____ people

Speaker's head table for _____ people

Audio-visual equipment. Please indicate type and number needed. You will be responsible for operating the equipment.

_____ Floor lecturn

_____ Table top lecturn

_____ Table microphone

_____ Floor microphone

_____ Projection screen

_____ Carousel slide projector w/remote control

_____ 8mm projector _____Super _____Regular _____Sound

_____ 16mm projector _____Sound _____Silent

_____ Opaque projector

continued

_____ Overhead Projector

_____ Record player (disc)

_____ Reel-to-reel tape recorder/playback

_____ Cassette recorder/playback

_____ with slide sync capability

_____ Video playback equipment; Type _____

_____ Flip charts

_____ Blackboard

_____ Other:

I will permit audio and/or video taping of my presentation for use by the membership of (Organization name).

_____ Yes _____ No

Please return this form by (date) to:

(name and address)

_____

(Signature of Group Representative)

APPENDIX E

EVALUATION INSTRUMENT

1. Which sessions did you attend?

_____ (Title of Presentation)

_____ (Title of Presentation)

_____ (Title of Presentation)

_____ (Title of Presentation)

_____ (Title of Presentation)

2. Will the content of each session be useful to you in your work?

	not useful				very useful
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					

3. Was the delivery of the material presented in an interesting manner?

	not interesting				very interesting
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					

4. Do you feel that the presenters were competent to present their topic?

	not competent				highly competent
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					

5. If audio-visuals were utilized by the presenter, do you feel that they detracted or enhanced the presentation?

	detracted				enhanced
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					
(Title of Presentation)	1	2	3	4	5
Comments:					

6. Was there enough variety among the topics offered?

too few				too many
1	2	3	4	5

7. How do you feel about the conference length?

_____ too short

_____ just right

_____ too long

Comments:

8. Indicate how many days this conference should last?

_____ 1 day only

_____ 1½ days

_____ 1 evening session, 1 day

_____ 2 days

Comments:

9. On what days should this conference be held?

_____ Weekdays--Monday - Thursday

_____ Weekdays--Thursday - Friday

_____ Weekdays--Friday - Saturday

Comments:

10. Evaluate the meeting rooms provided by the conference facility.

poor				excellent
1	2	3	4	5

Comments:

11. Evaluate the lodging accommodations.

poor				excellent
1	2	3	4	5

Comments:

12. Did you like the food which was chosen for the luncheon?

poor				excellent
1	2	3	4	5

Comments:

13. Overall, rate the quality of the conference.

poor				excellent
1	2	3	4	5

Comments:

14. Was the cost of the conference reasonable?

_____ Yes _____ No

Comments:

15. If you answered no to the above, where would you like to see costs reduced?

_____ Hotel accommodations

_____ Meals

_____ Registration

_____ Transportation

_____ Other (specify)

Comments:

16. How do you feel about the conference location?

poor				excellent
1	2	3	4	5

Comments:

17. Where would you like to see future conferences held?

Comments:

18. Please make any other comments regarding the conference in the space provided below, i.e., future topics, speakers, etc.

APPENDIX F

SAMPLE PRESS RELEASE

FOR MORE INFORMATION CONTACT: (date)
(Name and address)

* * * * FOR IMMEDIATE RELEASE * * * *

The (name of facility) will provide a spacious and attractive setting for the upcoming (name of conference) Conference, scheduled this year for (dates).

(Name of Organization) anticipates yet another successful conference, having consistently broken attendance records now set at over (number). This year's program will appeal to librarians and media specialists from all types of information environments, as well as to library trustees, friends-of-the-library groups, educators, authors, and the general public.

As suggested by its theme, "(name of theme)", a wide variety of interesting programs are planned. The first session will be held (dates and times), and will feature (title of presenter). The topic will be "(title of presentation)".

Not to be missed is the banquet with a special program by (name, title, and background of featured speaker).

Price information and further details about the Conference program may be obtained from: (name and address).

* * * END * * *

APPENDIX G

(Date) COMMERCIAL

The (Organization name) cordially invites your firm to participate in the exhibits of our annual conference to be held at (place and dates).

The enclosed materials provide general and specific information on the conference and exhibits. The exhibit area is located in the approximate center of all activities so exposure should be excellent. There is very good lighting available and all exhibits will be in one place instead of several. The entire facility will be occupied by (Organization) convention participants and exhibitors only.

Exhibit hours will be:

(LIST)

The annual general meeting has a time slot, (date; time), with no other activities scheduled.

In getting ready for this year's events we have had valuable input from several of last year's exhibitors and we have incorporated many of their suggestions into our overall plans. Our attendance last year was about (number) and we anticipate it will be somewhere close to that this year also. The cost for exhibiting and other pertinent information will be found in the rules and contract forms and advertising packet. Please be sure to read all the information so that your reservation requests will be correct.

Because the exhibits are such an important part of the conference, we sincerely hope you will be able to participate. I will look forward to meeting you again this year.

Sincerely yours,

(Name)
Exhibit Chairperson

APPENDIX H

CONFERENCE EXHIBITS CONTRACT

(ORGANIZATION NAME)

APPLICATION AND CONTRACT FOR EXHIBIT SPACE

AT: (place)
DATES: _____

RETURN TO: (name and address)

Please reserve one space ☐ (cost) at the (name of facility) for our exhibit at the (year) Conference, subject to the rules accompanying this application. Each additional space is 10% less.

The name sign for our booth should read: _____

Payment of $_____ is enclosed. Checks should be made payable to the (name of Organization). (Refer to items 3 and 4 of the enclosed information and Rules Covering Exhibits.)

NOTE: No cancellations will be accepted after: (date).

Name and address of representative who will attend the convention:

_____ _____

Description of your service _____(This is necessary for booth assignments. We do try to separate like services but it is sometimes difficult to determine that just from the firm's name.)

Date of application _____ Name of firm _____
(Please note if different from name on booth sign)

_____ Address _____
Authorized by (name and title)

FILL OUT AND RETURN TWO COPIES. ONE COPY WILL BE RETURNED TO YOU WHEN SPACE IS ASSIGNED IN (DATE).

ACCEPTANCE OF APPLICATION

The above application is accepted and the indicated space is assigned:

Date_____ Space no. _____

Charges $_____

Received $_____

Balance Due $_____ _____
Exhibits Chairperson

APPENDIX I

LETTER TO ADVERTISERS

(date)

The (Organization name) will be holding its Conference at the (place and dates).

The Program Book continues to be a successful venture, so we are again asking your support of the (Organization name) by placing an ad in it. The size and cost of the ads are on the reverse side of this letter.

Remember, you are entitled to the ¼-page ad, as included in your exhibit fee. There is no extra charge for using your ad copy. We would like to encourage those of you who merely took the ¼-page ad included in the exhibit fee to place a larger ad this year. (See attached contract for prices.)

Please send ad copy and payment by (deadline date) to:

(name and address)

Make checks payable to: (Organization name).

If you prefer to be billed, please indicate this on the contract. We would prefer payment with your order. All cuts will be returned. Printing will be done on an offset press (black and white only).

Yours very truly,

(name)
Advertising Chairperson

Enclosure

(ORGANIZATION NAME)
ADVERTISING AGREEMENT FOR
OFFICIAL PROGRAM AND GUIDE

We hereby authorize the (Organization name) Convention Committee to insert our advertisement in the Official Program and Guide of the Annual Convention.

The space we desire is _____ page, for which we agree to pay a sum of $_____ by (date) .

Date: _____

Payment Enclosed: _____ Company Title: _____

Address: _____

Ad Copy Enclosed: _____ Authorized By: _____

(To allow for most efficient assembly and composition, we urge that copy be submitted as far in advance of (date) , as possible.)

If you wish a proof copy, please indicate: Yes _____ No _____

ADVERTISING RATES:

Full page: (cost)
One-half page: (cost)
One-quarter page: (cost)
Front cover: (cost)
Rear cover: (cost)

Please keep one copy for your records and send other with ad copy and remittance to:

(name and address)

Make checks payable to: (Organization name)

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